NIH Library

Instructional Services
presents

Procite 4 A Tutorial for PC Users

http://www.isiresearchsoft.com

Training Schedule: http://nihlibrary.nih.gov/seminars/trainingcourselist.htm

Course Objectives

1. Create, open and close a library
2. Create a new reference, edit a reference, search for a reference, find duplicate references
3. Import references from databases such as PubMed and Web of Science
4. Use ProCite with Word to insert citations and format the document references and bibliography in different journal styles.

Overview

ProCite is a bibliographic management software program produced by Research Information Systems. It was created to help organize your personal reference collection easily. You can enter references in your database manually or collect and import references from online and web databases. ProCite helps you to create instant bibliographies using a cite while you write feature from within your word processor. With this option you can generate your manuscript and bibliography as a single document in one step.

Help topics are available to you throughout the program by pressing the F1 key or by clicking on the Help button that appears in dialog. Use the Help menu to display a list of topics organized by area or to search the help topics.
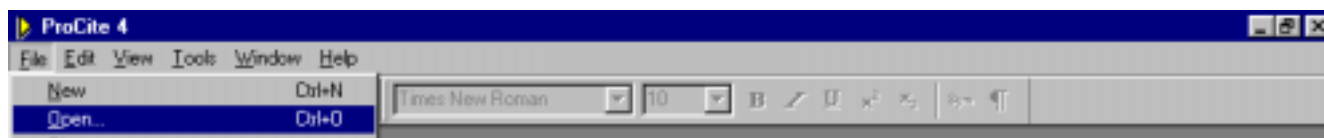
Starting ProCite:

From the Windows Start menu, locate the ProCite 4 program group and select ProCite or double click on your ProCite icon.
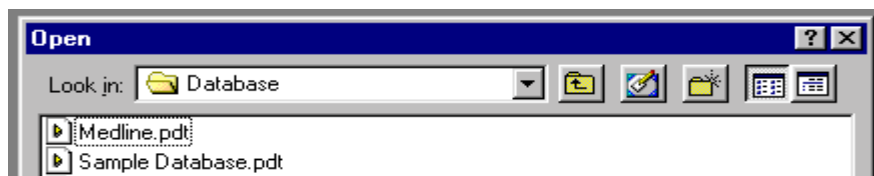
Opening the Sample Database:

If this is the first time you have started ProCite a File Open dialog is already displayed for you to locate and open a database.
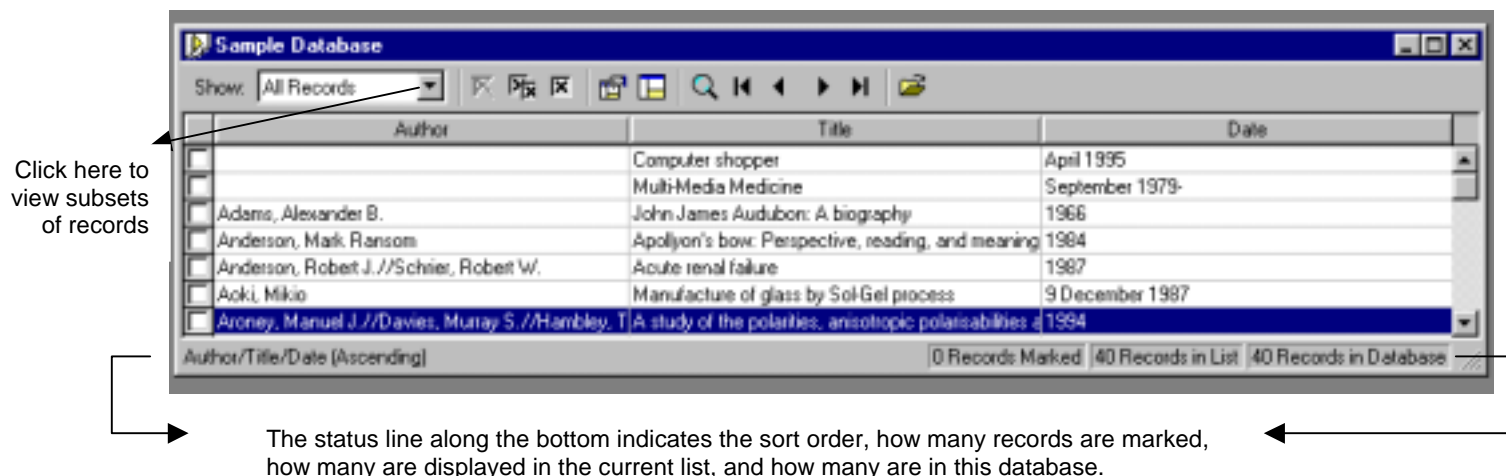
Otherwise, go to the File menu and choose Open.

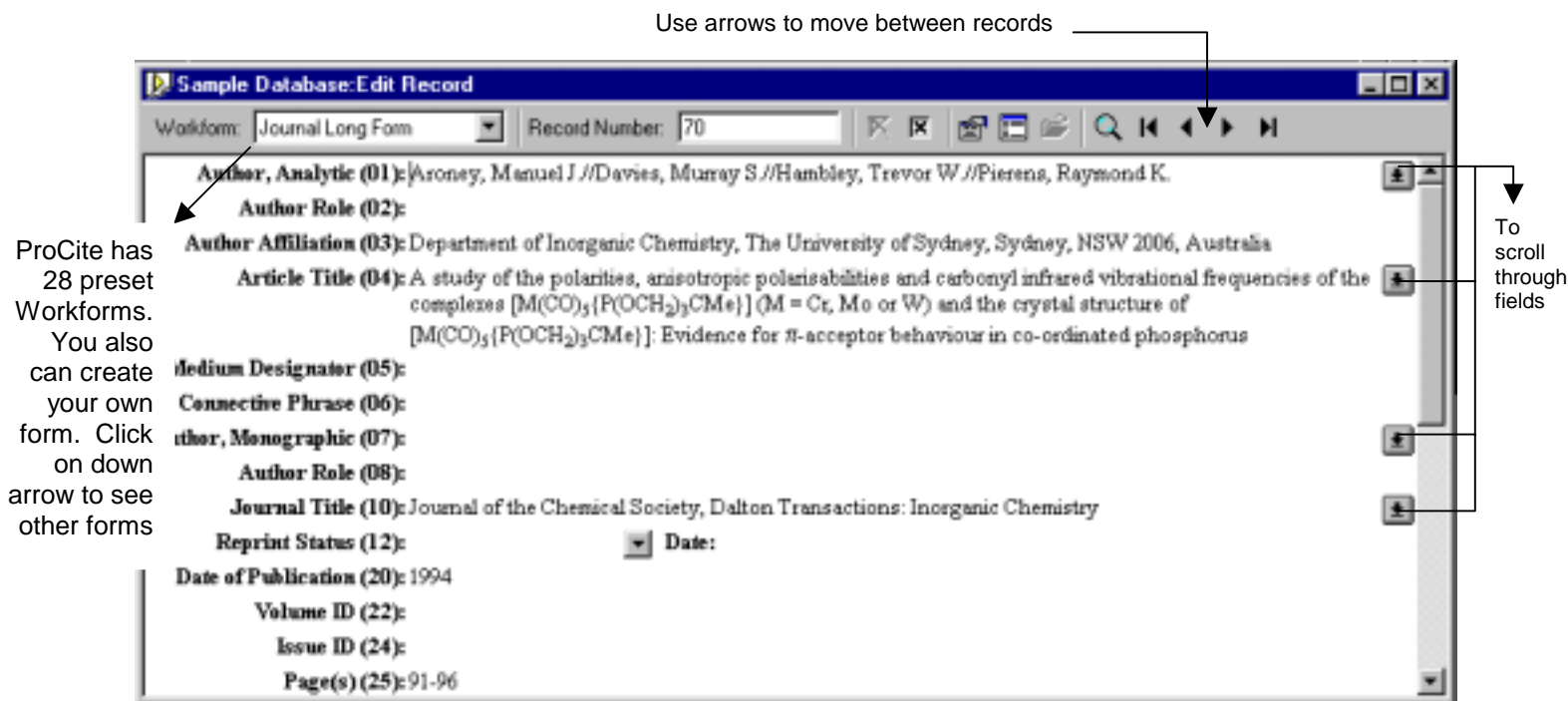Click on the database you want to open and click on the open button.

Viewing Records

Databases are always opened to a Quick Search window, which displays a list of abbreviated records. By default it shows the first author field, the first title field, and the first date field from each record, although you have the ability to customize which fields are displayed.

Click here to view subsets of records

The status line along the bottom indicates the sort order, how many records are marked, how many are displayed in the current list, and how many are in this database.

Viewing Full Records

Double-click on any of the records in the reference list to view it. The full record appears. (See below).

Use arrows to move between records

ProCite has 28 preset Workforms. You also can create your own form. Click on down arrow to see other forms

To scroll through fields

Component of the Full Record Screen

• The upper left list box indicates the Workform used for this record. Twenty eight Workforms are included with ProCite, covering a variety of document types. You can create any number of additional Workforms to meet your needs.

To return to the record list, choose Close from the File menu. Or, click on the record close box.

Inserting a Record

To add a new record: go to the Database menu and choose New Record.
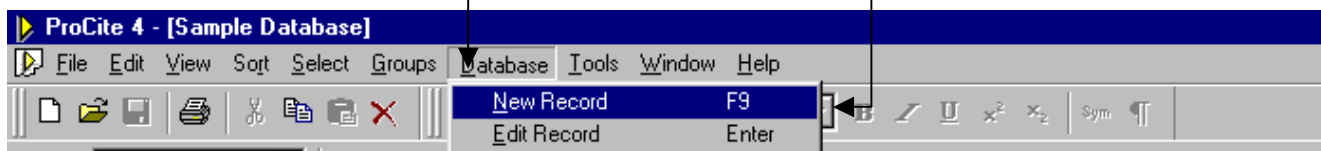

The Record toolbar includes:

ProCite template used to categorize information in a record. There is a different workform for each type of material such as Journal Article, Book.

The numeric identifier for a ProCite record. The record number is assigned initially by ProCite, but you can change it. ProCite allows for duplicate record numbers within a database.

Choosing a Workform

Each type of material you enter contains a unique set of information. For example, the information entered for a journal article is different than that entered for a book chapter. There are various workforms to match the needs of different document types.

Examples of different workforms
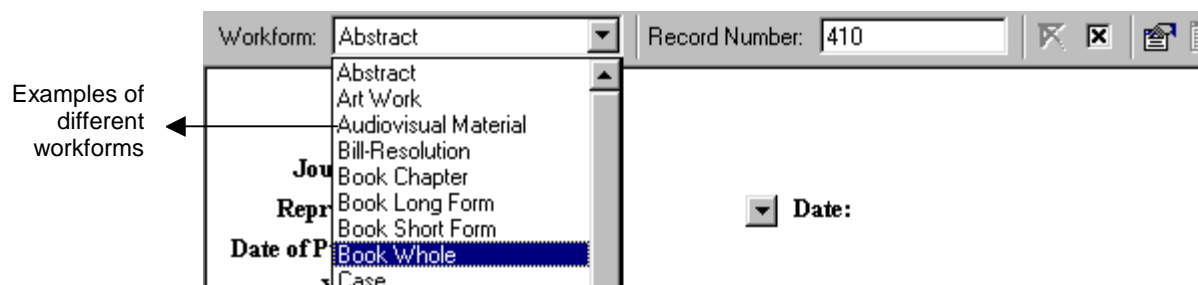
Each workform displays a set of field names with corresponding field numbers and the contents of a field. Journal Article is the workform initially displayed in a new database, but you can select a different workform for each record you enter.

To select a Workform:

1. Click the Workform box at the top left of the New Record window. The pull-down Workform list will appear:
2. Scroll through the list of Workforms and click on a form to match your needs. The pull-down list will close and the fields for the selected Workform will display (Example below shows part of the Book Chapter workform.)

Fields for a book chapter
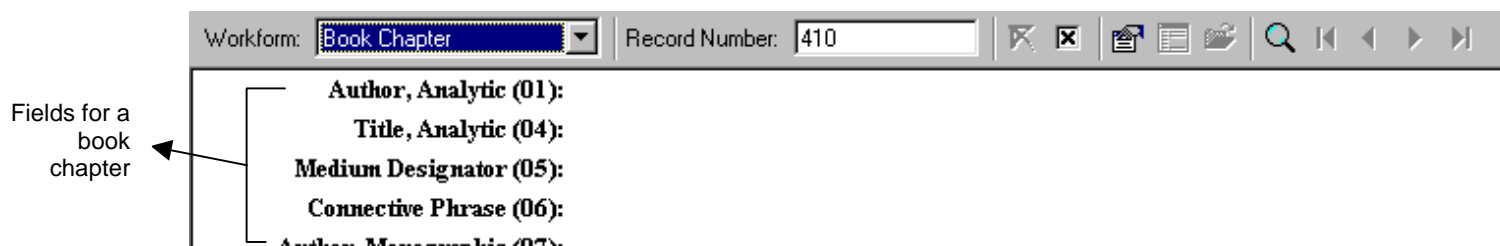
Manually Entering Text into a Workform

To begin inserting information manually, click in a field and type in information.

For **authors**, the surname is first, followed by a comma, and then the first name. For multiple authors, either enter each name on a separate line or use double slashes // or semicolons ; between author names entered on the same line. Press TAB or use the mouse to move to the next field.

For **titles**, capitalize the first word and any proper nouns in the title and do not put punctuation after the title. For **journal titles**, use either abbreviations or full titles. Do not mix both.

ProCite recognizes over 70 formats of **dates**. Almost any date format you put in will work: ie. Nov 1, 1999 or 11/1/99 or 11.1.99

Using Lists to Enter Information into a Workform

Lists are unique terms (words or phrases) that occur in particular fields of the records in your database. You can select terms from a list and insert it into a record.

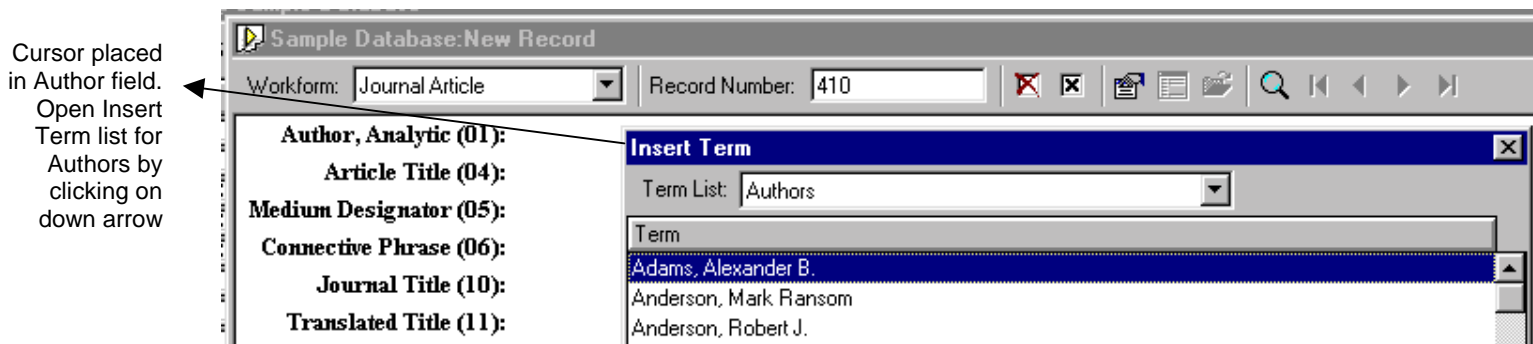There are several types of lists in ProCite:

Field Content List: Four Field Content Lists are automatically compiled from the data in each database: Authors, Journals, Titles and Keywords. You can choose from these internal lists to standardize the way data is entered and searched.

Term List: Term Lists are external, available to all databases, and you can contain terms that do not exist in your database. You can build and use any number of Term Lists for data entry and searching.

Journal Title List: Journal Title Lists can contain both the full journal names and corresponding abbreviations or acronyms. Use these lists for data input, searching, and substitution on output. You can create any number of Journal Title Lists with alternate abbreviations. This allows you to switch between full journal title names and abbreviations without changing the data in records.

To enter text using a list:
- Place the cursor where you wish to insert text. Click on the arrow button to the right of the text box. The Insert Term dialog will appear. The insert term window allows you to pick items from any available Field Content List, Term List, or Journal Term List. Highlight the term you want and click on insert term to insert the term in the Keywords field.

- Alternatively, you can use this dialog for any field by selecting Insert Term from the Edit menu.

Cursor placed in Author field. Open Insert Term list for Authors by clicking on down arrow

Sample Database:New Record

Workform: Journal Article   Record Number: 410

Author, Analytic (01):
Article Title (04):
Medium Designator (05):
Connective Phrase (06):
Journal Title (10):
Translated Title (11):

Insert Term

Term List: Authors

Term
Adams, Alexander B.
Anderson, Mark Ransom
Anderson, Robert J.

Importing Tagged Records

In ProCite you can add records to your database electronically by importing records from bibliographic citation databases such as MEDLINE, Web of Science, etc using configuration files that are set up to read and transfer tagged records retrieved from these various services. The configuration file tells ProCite how a file of tagged records is organized, including how to identify the beginning of a new record and the beginning of a new field. It also maps each field tag to a corresponding ProCite Field. The most significant part of importing tagged records is to determine from which service the records were retrieved. For example, the same MEDLINE record can be retrieved from PubMed or from the OVID system. Each service saves the same information in a slightly different tagged format. The appropriate service configuration file must be used for the record to be imported correctly

Example of a tagged PubMed output. Each field of in the record is preceded by a descriptive tag.

Record Separator tag →

Field Separator tags →

```
UI - 20166760
AU - Sagar KA
AU - Smyth MR
TI - A comparative bioavailability study of different aspirin formulations
     using on-line multidimensional chromatography.
LA - Eng
MH - Adult
MH - Anti-Inflammatory Agents,
     Non-Steroidal/blood/*pharmacokinetics/therapeutic use
```

To import tagged records:

1. Save bibliographic records from your online service, (MEDLINE, Web of Science, etc) in a tagged or labeled output as a plain text file.
2. In ProCite, go to the **Tools** menu and select **Import Text File**. In the file dialog window, locate and open the text file that contains the tagged records you want to import into ProCite. The file will be displayed onscreen.

To find file to be imported
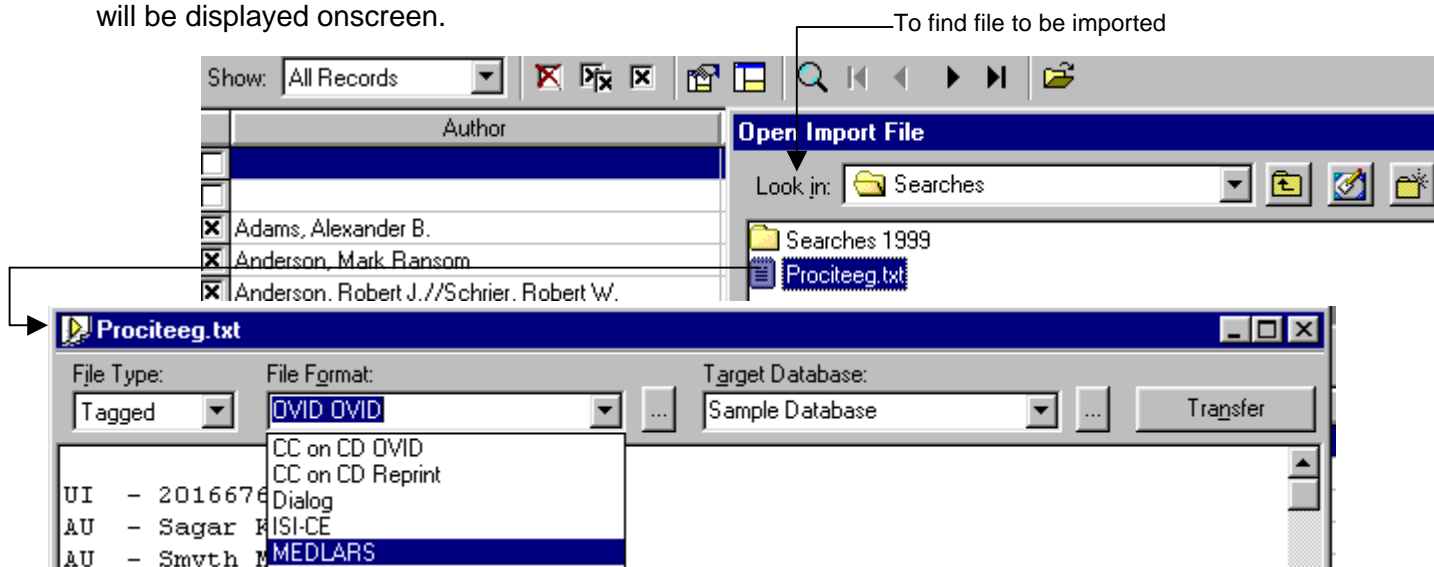
3. In the File Type drop-down list select Tagged.
4. In the **File Format** drop-down list, select the service from which you retrieved the tagged records.
5. In the **Target Database** drop-down list, select the ProCite database to receive the records.
6. Click on the Transfer button to begin importing the records. **Note**: The imported records are

marked. To see only those records that you just transferred, select **Marked Records** for viewing.

Saving the Record
You can use any of the following methods to save changes to your record while you are entering text or making changes.

- Go to the **Database** menu and choose Save Record or press F10
- or Click on the Save button on the Toolbar (the one with the disk icon)
- or Choose Save from the File menu.

Closing the Record
- Choose Close from the File menu, or click on the close box
- Click yes to save the new record and return to the abbreviated record list. If you have made changes since you last saved the record, ProCite will prompt you to save changes.

Finding Records
The ability to find certain records is powerful feature that enables you to access the information in your database in a variety of ways. Once you have found a subset of records, you can edit them as a group, print a bibliography, or perform various other operations on them. There are three methods for finding records

- **Using Field Content Lists and Marking Records:** This is a quick way to find records in a database.

  1. From the Select menu, choose Clear Marked Set if it is available.
  2. Click on Show and select Workforms ProCite displays a list of all of the Workforms used in this database, with a count of how many records use that Workform.
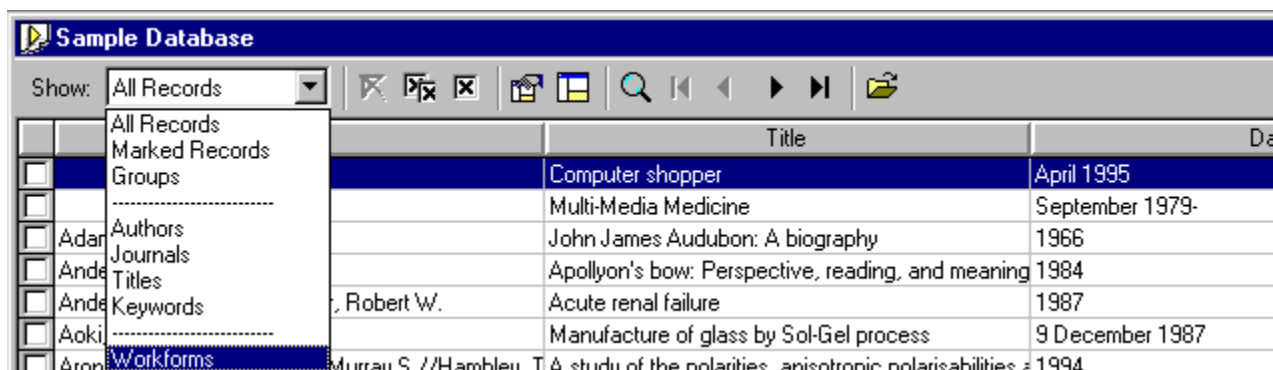
  3. Scroll through the list and click on a workform for which you would like to find records.
  4. Click the [xx] button on the Toolbar to mark the records in the current list.
  5. Select the Marked Records in the Show box on the toolbar. ProCite displays the subset of records you created by marking them. You can add any individual record to the marked set simply by selecting its check box. Marked records can be added from any list of records.

- **Content List**: Show all unique entries in the chosen field for the active database. You can build a subset by marking the records. You can mark and unmark by clicking on the checkbox next to a record.

- **Searching:** Use the Search window to look for text in any ProCite field. You can search every field in every record, but a search limited to specific fields is faster. With the database open, choose Search from the Select menu. The Search window will appear:
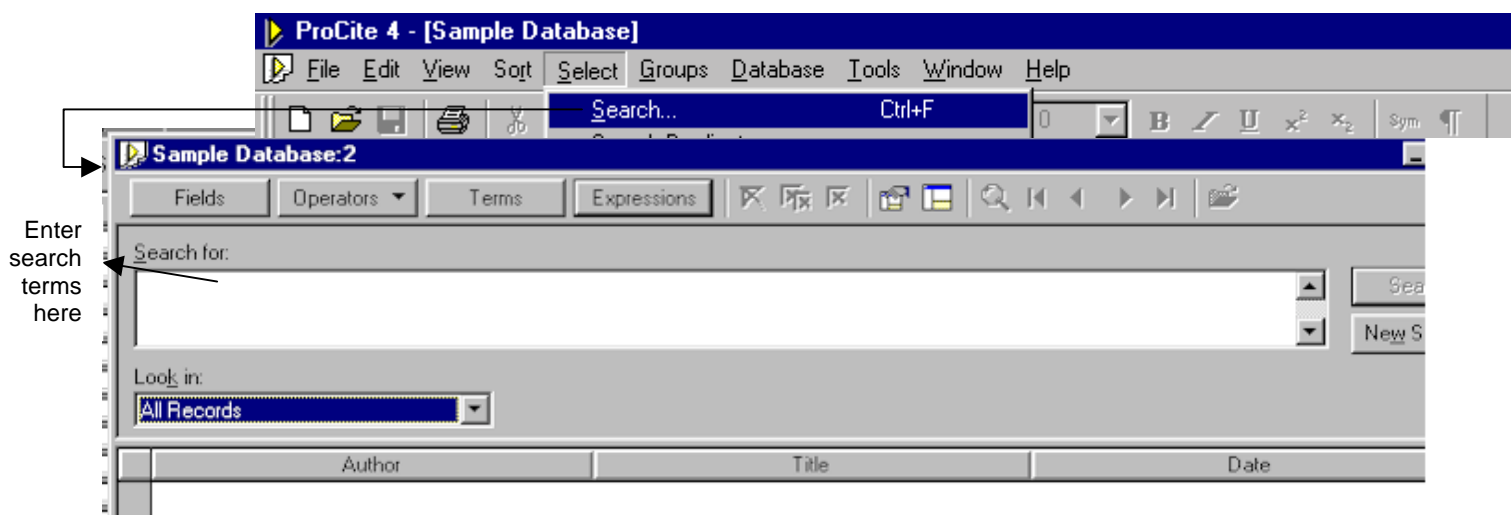

You enter your search expression in the Search For text box. You can create a new expression, modify the existing expression, or restore a saved expression. You can type the search expression manually, or you can use the buttons along the top of the window to guide you.

Printing a Bibliography of Database Records

You print a formatted bibliography that is composed of all records in your database, or a select group of records. The format of the bibliography is defined by the Output style you select.

1. Select all records in the Quick Search view to list all records in the database
2. From the **File** menu, select **Print Bibliography**, and a bibliography preview appears:
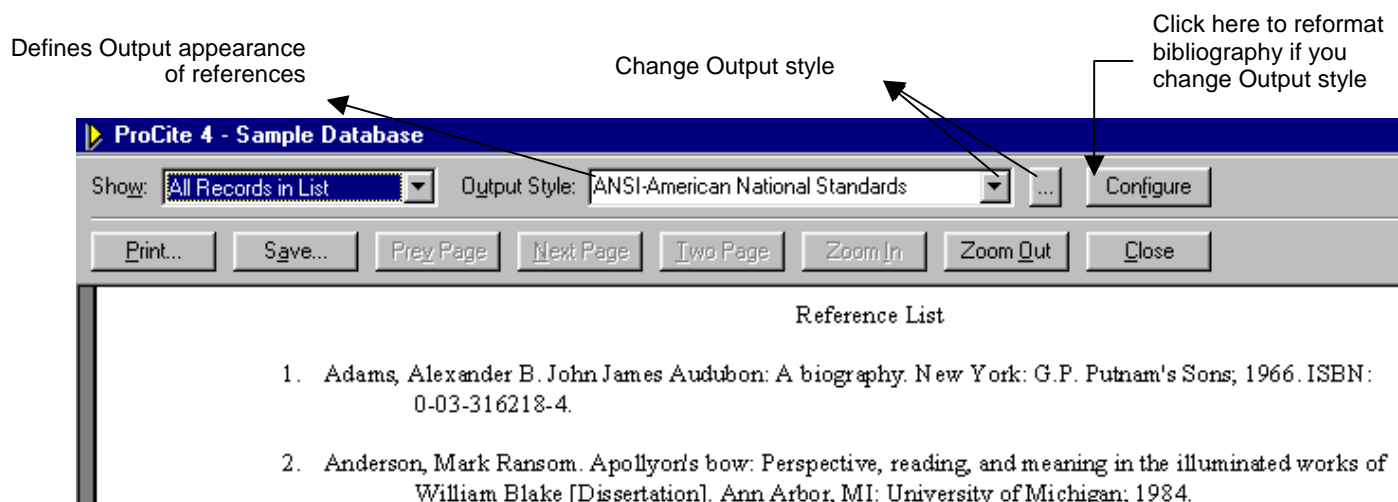
Citing ProCite Records in a Manuscript

ProCite can automatically format citations and create a complete reference list in your Microsoft Word or WordPerfect manuscript. ProCite installs cite while you write support for Word Perfect and

Microsoft Word. ProCite commands appear either directly under or in a ProCite 4 submenu of the Tools menu in your word processor.

There are three ways to link citations to ProCite records.
- Use Insert Citation to link each citation as you write
- Use Insert Marked Records to link a set of records currently marked in a ProCite database.
- Use Scan Document to process a "batch" of citations. Use this operation if you already have written a manuscript with citations in delimiters (e.g. Anderson, 1990). ProCite will scan either highlighted text or your entire document, and automatically execute an 'Insert Citation' operation on each citation.

Inserting Citations into Text of your Manuscript

1. **Start your word processor** and create or open the document in which you wish to insert citations
2. Move the cursor to where you want the citation inserted, and from the **Tools** menu select **Insert Citation**. ProCite displays an Insert Citation window.
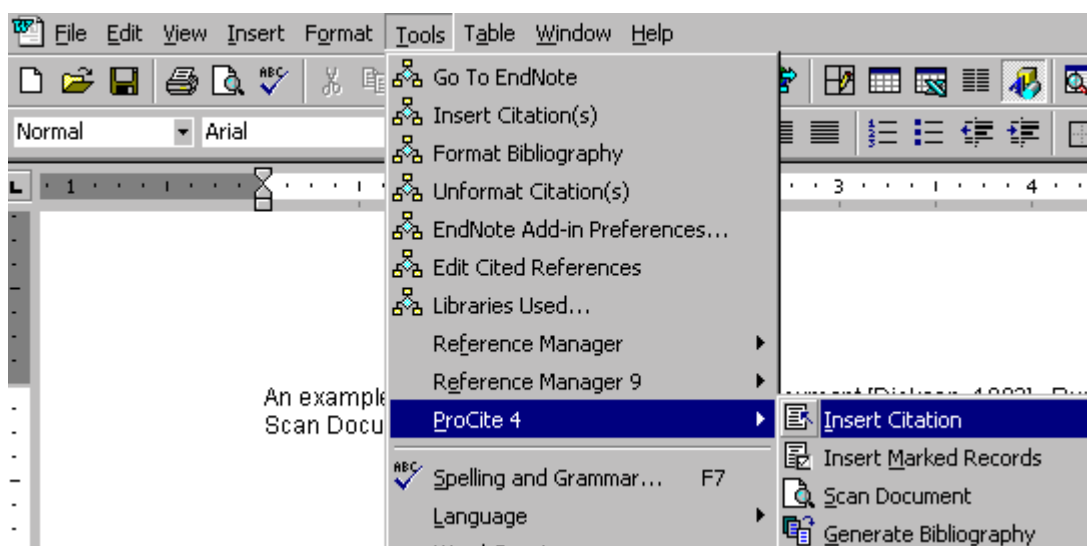
3. In the **Identifying Text** box in the window type sufficient text for ProCite to locate the record you want to cite (e.g. Dickson, 1985) In the **Look In** box in the window, indicate the databases in which to look for records. ProCite can look in any number of databases.
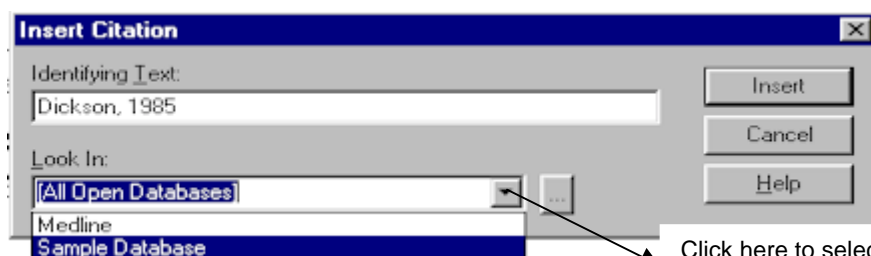
Click here to select database(s) to be searched for Scan Document

4. Click OK. ProCite will compare the identifying text to the records in your ProCite database. If a single record matches, the text will be replaced with an unformatted citation. If more than one record matches, ProCite will list them for you, so you can choose the appropriate reference.
5. After you insert your citations, save your document.

Inserting Marked Records
You can mark any number of records in a ProCite database and then insert those records at one place in your manuscript.

To Mark:
In the ProCite database, mark the records you want to insert by clicking on the box to the right of the record. Then, from your word processor, in your manuscript, choose Insert Marked Records from the Tools menu.

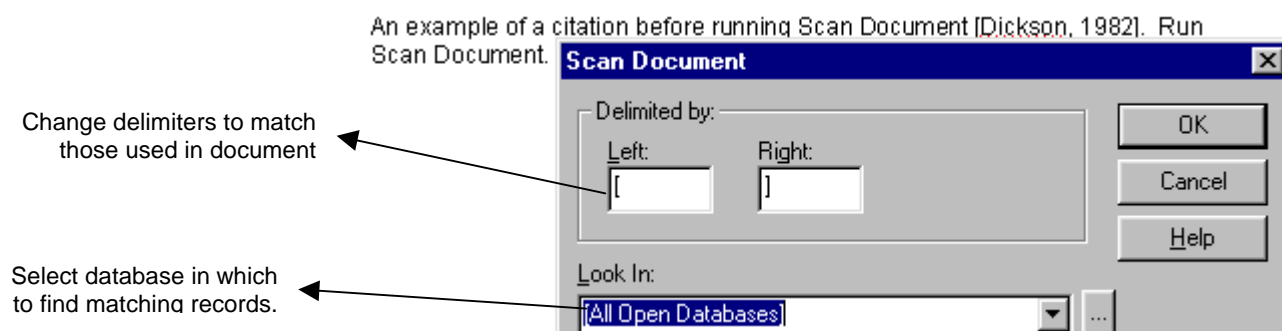This is helpful in two situations.
- You want to place multiple records in one place in your manuscript. Finding and marking the records in ProCite may be much easier and more accurate than typing identifying text for each record.
- You cannot remember enough unique text for Insert Citation to identify the one record you want. It may be easier to find and mark the record in ProCite.

Matching Existing Citations Using Scan Document
The Scan Document process automatically steps through your document to find identifying text and insert citations. Unless you enter more identifying text later or use 'Revert to Original Text' you will only need to use Scan Document once per manuscript. Once you have linked records to your manuscript, you can format the citations using Generate Bibliography.

To Use Scan Document:
1. **Start your word processor** and open the document that contains identifying text.
2. Make sure each string of identifying text is surrounded by delimiters characters that you insert before and after text. Delimiters can be single characters or multiple characters. Typical delimiters are parentheses, brackets, or curly braces: (..) or [ ] or { }. You must use the same set of starting and ending delimiters throughout your document. For example, to find a work published in 1982 by the author Paul Dickson, enter [Dickson, 1982].
3. From the **Tools** menu, select **Scan Document**. A dialog box will show the delimiters (starting and ending text) that ProCite will look for to find identifying text in the document. Under **Look In** select the databases you want ProCite to search. If you make changes, click on OK

Change delimiters to match those used in document

Select database in which to find matching records.

4. ProCite will start at the beginning of your document and will step through your citations, highlighting them one by one to attempt to Insert Citation. ProCite will replace the matching records with unformatted citations. When done, **Save** your document.

Example of an unformatted citation created by Scan Document

NIH Library Help 496-1080

Generating the Bibliography

Once you have entered identifying text and inserted each citation in your manuscript to link it to a ProCite record, you can generate a bibliography. Generating a bibliography serves two functions: It formats each in-text citation according to a bibliographic style and it adds a complete reference list to the manuscript.

The format used to print citations and references is determined by the Output Style selected.

1. Choose **Generate Bibliography** from the **Tools** menu to display the Configure Bibliography dialog. Any changes made to this dialog are remembered for this document.

Allows you to determine which fields are listed in Output Style

To change font type and size

The title of your reference section (e.g. Reference List, References, Bibliography) is determined by the Output Style
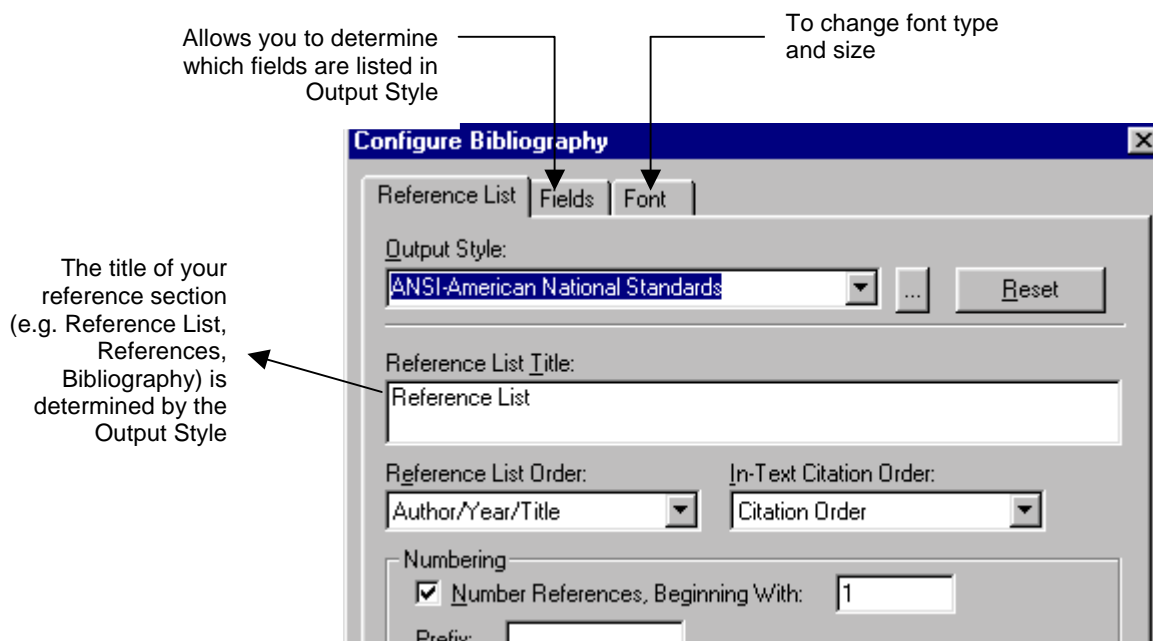
2. The **Output Style** determines how each citation in text is formatted and how each reference in the bibliography is printed - which fields will print from each record and in what order. To select an output style for a bibliography, use the pull-down list under Output Style. There are over 300 output styles corresponding to different journals or bibliographic styles.
3. The **Reference List Order** determines the sort order of references in the bibliography. The In-Text Citation Order determines the order of multiple citations inserted at the same point in a manuscript. The rest of the options on the Reference List tab are updated to reflect settings in the Output Style.
4. Click **OK** to Generate the Bibliography.

The citations in your bibliography are automatically converted to the in-text citation format specified in the current Output Style. Each reference cited is also included in a bibliography at the end of the manuscript and is automatically formatted according to the current Output Style.

ProCite 4 (Win) Downloading and Importing Formats for
PubMed, Internet Grateful Med, Web of Science

PubMed
- Select specific items by clicking on the empty box to the left of a citation (if none are selected, default is all references).
- Choose *MEDLINE* from the pull-down Display menu.
- Click the *Display* button
- Click on the *Save* button
- Save the file as .txt (e.g. medicine.txt)

From ProCite
- In *Tools* pull down menu, select *Import Text File*.
- In *Open Import File* window, enter name of the file to be imported or browse to select file.
- In the next window, the settings are - *File Type*: Tagged, *File Format*: Medlars, *Target Database*: name of ProCite database to receive the import. Click on *Transfer*.
- In *Database Identifier Not Found* window, click on *Choose*. Select *MEDLINE*. Click *OK*
- Close window. To see new references, in *Show*, select *Marked Records*.

Internet Grateful Med
- Click on the *Download for Disk* button.
- Choose option 'all records' or 'only records that were selected on the Results screens'.
- Pick the option that matches your desired level of detail.
- Click on the *Select Format*.
- Choose *Tagged MEDLARS format (suitable for loading into reference manager programs)*
- Click on *Download Now* to save file.

From ProCite
- In *Tools* pull down menu, select *Import Text File*.
- In *Open Import File* window, enter name of the file to be imported or browse to select file.
- In the next window, the settings are - *File Type*: Tagged, *File Format*: Medlars, *Target Database*: name of ProCite database to receive the import. Click on *Transfer*.
- In *Database Identifier Not Found* window, click on *Choose*. Select *BackMed*. Click *OK*
- Close window. To see new references, in *Show*, select *Marked Records*.

Web of Science
**If you have not previously done so, download the Web Capture Utility.
1. Click the Help button.
2. Select Export > ISI/RIS Web Capture Utility > Click Here to Download > Windows or Mac version.
3. Follow the onscreen Download and Installation Instructions.

- Select specific references by clicking on the empty box to the left of a citation or select all references by clicking the *Mark All* button.
- Click the *Submit* button.
- Click the *Marked List* button.
- Click on *Export* button. Choose ProCite file name to receive citations. The citations will be in ProCite when the program is opened